



INSTRUCTIONS FOR SAVED SEARCHES: A POWERFUL FEATURE THAT ALLOWS YOU TO QUICKLY MANIPULATE DATA

I. BASIC ASSUMPTIONS

Given that Search is perhaps the most robust feature of the entire program, we think it prudent to provide some specific examples of useful saved searches. Your needs may differ, but hopefully these snippets will provide inspiration for other ideas or desired queries.

Instructions for individual users are as follows:

II. SAVED SEARCHES: THE BASICS

Disclaimer: This feature requires a mobile device more current than the Blackberry 8900. If users are on an older phone, for example the Blackberry 8330 or the 8320, they need to know that they will not be using the new search feature until their device is upgraded.

NOTE: Remember, because you can customize your menus and searching style, that you need to be in Enhanced View search mode to use/ create a saved search. So, click on Customize in the bottom right corner of your screen, and verify that the drop-down box for Search reads Enhanced View.

1. Click on Schedule | Search
2. Click the Save Search button. This takes you into the customized search builder.
3. Under the Customized Search drop-down, you will see all of the searches associated with your account.
4. Start by giving your new search a name. We advocate using something logical, for example Tracy's Team: To Month End, so you can remember its purpose later.
5. Click on Surgery Status. With it, you can sort the surgeries as desired. If you leave it blank, then surgeries in all categories will be displayed. But, if you want to sort the surgeries by pending (surgery date in future), completed (surgery date has passed), closed (all paperwork is complete) or canceled, then you have the option to do so.
6. Select a date range. Please note that all dates in the builder are relative. Therefore, if one selects plus fourteen days, then every time the Search screen is hit - the dates will automatically be formatted with today plus fourteen days.

Also note the "start of DePuy month" and "end of DePuy month" features. These allow you to view surgeries until the end of the defined month, as per DePuy. The software is smart enough to know the real DePuy month dates, so you don't have to worry about them.

7. Click on Add Search Filter to select the desired search details, .e.g., sales team, facility, surgeon, etc.

NOTE: To remove any search filter, check the blue X.

8. Click the checkbox for Save as default search, if this is your desire.
9. Click the Save Customized Search button and - voila! - you are done.

III. SAVED SEARCHES: HANDY TIPS

Using the instructions above, modify your filters (step 7, above) as follows:

SORTING PENDING CASES THAT LACK A PICKSHEET

1. If you want to be able to see cases, for your team, which are lacking a picksheet, then add these filters:

Picksheet Selected = no
Sales Team = (desired team)
Dates = (desired dates)

SORTING CASES THAT HAD A PICKSHEET

1. If you want to be able to see cases, for a particular sales representative or team, that had a picksheet – and you can quantify this by time, e.g., a given DePuy month – then add these filters:

Picksheet Selected = yes
Sales Team = (desired team)
Dates = (desired dates)

SORTING BY INVENTORY ITEMS

1. If you want to be able to see what inventory items were actually ordered, for a given team or date range, then use the following filters:

Sales Team = (desired team)
Dates = (desired dates)

2. On the right side of the screen, under the Search Inventory Item Usage bar, click the Select Inventory Items link.

3. Just as if you are adding a picksheet, select the given inventory item.

4. Run your search! You will see all cases that included the desired inventory item.

SORTING BY DER COMPLAINT NUMBER

1. If you need to be able to match a surgery to a DER complaint number, from DePuy, then create a saved search with the following elements:

Forms/Fines – DER Complaint Number

2. Enter any number.

3. The next time you call the search, just change the DER Complaint number. You might have to modify the date range too. But, you will be able to find the specific case.

SORTING BY P.O., USAGE NUMBER, ETC.

1. If you need to be able to match a surgery to a specific P.O. or Usage number, then created a saved search with the following elements:

Forms/Fines – Notes

2. Enter any text.

3. The next time you call the search, just change the text in the notes field. You might have to modify the date range too. But, you will be able to find the specific case by using one particular number.